

# PD<sup>2</sup> v4.1d

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## Introduction

This section of the release notes outlines the functional changes that were implemented in Procurement Desktop-Defense (PD<sup>2</sup>) v4.1d. PD<sup>2</sup> v4.1d contains over 500 functional improvements; the most significant software changes are discussed below. This document is cumulative in that it also contains the release notes for v4.1c, v4.1b, v4.1a and v4.1 of PD<sup>2</sup>; thereby an issue listed as a known defect in v4.1 may have been corrected in a later version of the software. The functional changes for v4.1d are organized into the following modules and features:

- Desktop Functions
- Requirements Functions
- Pre-Award/Award Functions
- System Administration Functions
- Reporting Functions
- Organization Maintenance Functions
- Corrected Software Issues (across the life-cycle of the procurement process)
- Software Issues

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## Desktop Functions

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### PIIN Sequence Counter

PD<sup>2</sup> contains a Procurement Instrument Identification Number (PIIN) sequence counter that tracks each of the DODAAN/Year/Contract type/serial number combinations assigned to procurement documents existing in the system. This counter also tracks Supplemental Procurement Instrument Identification Numbers (SPIINs). Whenever a new procurement document is created in PD<sup>2</sup>, the system suggests a serial number for a given DODAAN/Year/Contract type combination by adding one to the last serial number assigned to that combination. In previous versions of PD<sup>2</sup>, it was possible for the software to suggest duplicate PIIN/SPIINs if

the PIIN sequence counter had been set back, either by System Administrators using the **PIIN Maintenance** task or by users overriding the PIIN/SPIIN suggested by the system and selecting a previously unused PIIN/SPIIN.

AMS has enhanced the software so that it no longer suggests duplicate PIIN/SPIINs for new procurement documents. If the next PIIN/SPIIN in sequence has already been assigned to a previous document in the system, then PD<sup>2</sup> will suggest the next available PIIN/SPIIN. It will even suggest a PIIN/SPIIN from the next available “gap” of serial numbers.

USED	GAP	USED	GAP	USED	
Serials 1-11	Serials 12-15	Serials 16-21	Serials 22-29	Serials 30-35	Serials 36 & up

*Example 1*

Example 1: The system suggests 36 as the next available PIIN/SPIIN serial number, but the System Administrator knows the serial number “gaps” for this PIIN/SPIIN include 12-15 and 22-29. If the PIIN sequence counter is reset to 12, then the system will suggest 12 as the next PIIN/SPIIN serial number. It will also suggest 13, 14 and 15 in sequential order. The system then skips to 22 after 15 is used.

Example 2: The system suggests 9 as the next serial number for a particular PIIN/SPIIN, but the suggested serial number has not been accepted and saved by a user. Users creating subsequent documents with the same PIIN/SPIIN will receive suggested serial numbers in sequence, *i.e.*, 10, 11, 12. If the user who received 9 as the suggested serial number cancels that document, then the system will suggest 9 as the next available serial number for that PIIN/SPIIN. Once 9 has been accepted and saved by a user, then PD<sup>2</sup> will skip 10, 11 and 12 (assuming they were accepted and saved) and suggest 13 to the next user creating a document with that PIIN/SPIIN.

For more information on the PIIN Maintenance System Administration task, refer to the “PIIN Maintenance” section of the System Administrator’s Guide or the PIIN Maintenance section of the v4.1c release notes.

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## Requirements Functions

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### DD Form 1423 – Contract Data Requirements List (CDRL)

AMS has added text to the **Create CDRL** window to inform users of the correspondence between the number of data items selected for the CDRL and the number of contacts that can be entered in Block 14 of the DD Form 1423. Selecting one data item allows 38 addressees; selecting two data items allows twelve addressees; and selecting four data items allows three addressees. If users attempt to exceed the number of addressees the system allows for the number of data items selected, PD<sup>2</sup> provides a warning message and saves only the allowed number of addressees in Block 14.

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## Pre-Award/Award Functions

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### DD Form 1155 Award

AMS has enhanced the software to allow more than one check box in Block 11 of the DD Form 1155 award to be marked if the vendor selected for the award has multiple business characteristics (*e.g.*, Small Business, Small Disadvantaged Business, Women Owned Business) identified in the **Vendor Categories** field on the *Vendor* tab of the Vendor Maintenance module. The system now supports the following five combinations for the three boxes that appear in Block 11 of the DD Form 1155:

1. The **Small Business** box is checked.
2. The **Small Disadvantaged Business** box and the **Small Business** box are checked.
3. The **Women Owned Business** box and the **Small Disadvantaged Business** box are checked.
4. The **Women Owned Business** box, the **Small Disadvantaged Business** box, and the **Small Business** box are checked.
5. The **Women Owned Business** box is checked.

The **Vendor Size** and **FSC/SIC Preference Program** data selected in the Vendor Maintenance module does not populate Block 11 of the DD Form 1155. Only the three business characteristics (*e.g.*, Small Business, Small Disadvantaged Business, Women Owned Business) mentioned above populate Block 11 of the DD Form 1155.

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## Offer Evaluation

As directed by the Joint Requirements Board (JRB), AMS has removed the **Shipping Amount** and **Trade Discount** fields from Offer Evaluation. In the near future the Defense Financial Accounting System (DFAS) will require shipping costs to be broken out as a separate line item; therefore, the JRB decided to remove these fields from the **Line Item Detail** window of the vendor quote sheet in Offer Evaluation.

In addition, AMS has modified the software so that when a user adds a new line item to a vendor quote within an Offer Evaluation, that line item pulls into the printed SF 1409.

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## Offer Evaluation – EDI 843 Transaction Sets

AMS has improved the interaction between the Offer Evaluation module and the EDI 843 transaction set in the following ways:

1. In an Offer Evaluation (prior to award), the user now has the ability to pull **CLIN Description** and **Extended Description** data from either the original solicitation or the Offer Evaluation forward into the award. As in previous versions of the software, the **CLIN Description** and **Extended Description** fields are located on the **Line Item Detail** window. The system pulls the description data from the solicitation by default. However, the user has the ability to change the default and pull the **CLIN Description** and the **Extended Description** data from the Offer Evaluation. If these fields are blank in the Offer Evaluation, the system will pull the description data from the solicitation.
2. When an EDI 843 transaction set is received, PD<sup>2</sup> now reads the **Currency Code** field denoted in the 843 header. If this data is absent, the system will assume that the cost associated with that 843 is in US dollars. As the Offer Evaluation pulls data from the 843 transactions, all costs are converted to US dollars. The currency conversions are calculated based on the exchange rate stored in the **Currency** task in the System Administration module. It is the System Administrator's responsibility to keep the exchange rates accurate. After the contract is awarded, the user has the ability to convert pricing information to any currency supported by PD<sup>2</sup> (current functionality). To decrease the possibility of a rounding error occurring during these conversions, the system now calculates conversions up to ten digits to the right of a decimal point.
3. In order to differentiate between the status of multiple 843 transaction sets sent by the same vendor, PD<sup>2</sup> now populates the **Buyer's Comments** field in the **Line Item Detail** window of the Offer Evaluation Quote Sheet with comments entered by the vendor on the 843. The status of the bid now displays at the beginning of the **Buyer's Comments** field prior to any text and indicates if the 843 is an a) original, b) change to the original or c) cancellation of the original or change. The status is separated from the rest of the comments by a colon.
4. The Offer Evaluation module cost fields have been visually expanded to display the sixteen digits supported by the system.
5. The EDI 843 input functionality has been enhanced to alleviate conflicts with data imported from DoD Legacy systems.

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## Sorting Clauses

In previous versions of the software, the system sorted clauses in ascending order only during initial automatic clause selection. If a user subsequently added clauses, either manually or by rerunning automatic clause selection, PD<sup>2</sup> added the additional clauses to the beginning of the document section selected by the user. The software has been enhanced so that all clauses added to a section of a document are sorted in ascending order regardless of when they are added to the document.

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## System Administration Functions

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### Buy USA Maintenance

The following three exemptions have been combined into one for v4.1d:

- Books, trade, text, technical, or scientific; not printed the US and for which domestic editions are not available
- Newspapers; pamphlets; magazines; not printed the US and for which domestic editions are not available
- Periodicals; printed briefs and films; not printed in the US and for which domestic editions are not available

If your site is upgrading to v4.1d from previous versions of the software, you will see two fewer exemptions and a new one.

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### Closeout Maintenance

Users logging on to PD<sup>2</sup> now receive a message box giving them the option to run or bypass the system's automatic check for contracts matching predefined closeout criteria.

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### Transaction Log Dumps

Incremental dumping of the transaction log allows for better recoverability than under the previous model, which allowed only for reloading of an entire database from its last dumped state. With incremental dumps of the transaction log, a site is dumping only the transactions that have been committed since the last dump. As a result, incremental dumps of the transaction log take less time to perform than full database dumps, meaning they can be performed several times per day for even large databases. In certain situations where the transaction log is still intact, incremental dumping of the transaction log allows a site to reconstruct its database to the exact condition it was in when the database went down, even if it wasn't dumped immediately before a server failure.

Before beginning to perform incremental dumps of the transaction log on their production databases, site personnel should review the incremental dump procedure and practice both dumping and restoring with incremental backups on a test database. Sites wishing to take advantage of this capability should consider increasing the size of their transaction logs. For more information, consult the Sybase System Administration guide, available at <http://sybooks.sybase.com>.

The suggestions above regarding incremental dumping of the transaction log are **not** meant to replace full backups of the database. All sites should still be performing nightly backups of the database.

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## Reporting Functions

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### Impromptu Reports

The Impromptu catalog contains the following new catalog folders:

- Procurement/workload folder;
- FPDS folder with subfolders DD1057 and DD350;
- Pre-Award/Award/Post-Award folder;
- new subfolder under the Procurement folder called Award (unconformed).

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## Organization Maintenance Functions

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### Organization Maintenance

The software has been enhanced so that an organization address selected by a user in User Preferences as a default for procurement forms is automatically updated whenever that organization's address is updated in the Other Organization Maintenance module. If an organization's address is deleted from the Other Organization Maintenance module, then the corresponding default address is also automatically deleted from User Preferences. The system then sends an alert message to all users with this default address, notifying them that a default address was deleted and their User Preferences must be updated.

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## Corrected Software Issues

The following software issues have been corrected in PD<sup>2</sup> v4.1d. The version of PD<sup>2</sup> in which the issue was discovered is listed in brackets following the description.

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### BPA Call

When line items from a purchase request are attached to a BPA Call, the purchase request number and funding information for each line item now display on both the printed and EDA versions of the document.

[v4.1]

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### Performance Improvements

AMS has improved the performance of PD<sup>2</sup> during the generation of Summary of Changes documents and during printing and print previewing of SF 30 modification documents. This performance improvement will be most noticeable for contracts with large numbers of CLINs and/or many lines of line item level funding, especially for clients with large numbers of funding strips. However, all sites using this service release will have some level of performance improvement in the areas noted.

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### Procurement Profile Task

The software has been modified so that the System Administrator can use the **[Delete]** button for the address block on the *User* tab of the **Procurement Profile** task.

[v4.1a]

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### SF 30 Modification

When modifying an award, users who increased the quantities of multiple CLINs noted that the system's pre-approval check notified them of only the first CLIN with a quantity exceeding that in the originating PR. PD<sup>2</sup> has been modified so that the system's pre-approval and pre-release checks notify users of all CLINs with quantities exceeding those in the originating PR.

[v4.1b]

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### SF 30 Multiple Contract Modification

Continuation pages for the SF 30 modifications that are created for each award identified in a Multiple Contract Modification document now list the document

number of the award that is being modified in the header. The document number of the Multiple Contract Modification no longer incorrectly populates the header.  
[v4.1]

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### SF 33 Award

The Funds Certification Document (FCD) is functioning with the SF 33 Award. It is no longer necessary to use the SF 26, SF 1449, or other available award forms instead of the SF 33 Award if an FCD is a necessary part of the process.  
[v4.1]

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### Windows with Scroll Bars

In a previous version of PD<sup>2</sup>, users noticed display problems after repeatedly clicking the scroll bar directional arrows in windows. For example, users clicking the directional arrows to read the rules in the **Validation Rules Summary** window reported display problems on both that window and the **FPDS – Individual Contracting Action Report** window. After both of these windows were closed, the display problems began to affect other objects on the desktop, and users could correct the problem only by rebooting their computers.

AMS investigated this issue and found that the problem was caused by a deficiency in PowerBuilder, the development software environment created by Powersoft. Powersoft has since corrected this deficiency in their development software environment, and AMS used the corrected PowerBuilder environment to develop PD<sup>2</sup> v4.1d. The directional arrows on all PD<sup>2</sup> windows with scroll bars now function normally, so users may click the arrows or drag the scroll bar to move through a window. It is no longer necessary to drag the scroll bar to scroll through a window as required in the v4.1c release notes.  
[v4.1c]

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### Word Wrap Deficiency Corrected

In previous versions of the software, the system did not process the word wrap between lines when text entered into Block 14 of the SF 30 was generated into the document. This problem also occurred in Block 6 of the SF 252 award and in Block 10 of the SF 1442 form. AMS investigated this issue and found that the error was caused by a deficiency in PowerBuilder, the development software environment created by Powersoft.

Powersoft has since corrected this deficiency in their development software environment, and AMS used the corrected PowerBuilder environment to develop PD<sup>2</sup> v4.1d. PD<sup>2</sup> now correctly processes the word wrap between lines. It is no longer necessary to press <CTRL> + <Enter> to manually force the word wrap when entering data into the text field in Block 14 of the SF 30, Block 6 of the SF 252 award, or Block 10 of the SF 1442 form.  
[v4.1]



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## Software Issues

The following software issues exist in PD<sup>2</sup> v4.1d. The version of PD<sup>2</sup> in which the issue was discovered is listed in brackets following the description.

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### CLIN Matchmaker

Users have reported display problems when associating four or more CLINs in the **CLIN Matchmaker** window. When the scroll bar is used to move down the window, it may appear that additional CLIN associations not requested by the user have been made; when the scroll bar is used to move up the window, these unwanted CLIN associations appear to clear. The work solution is to use the directional arrows to move around in the **CLIN Matchmaker** window, rather than dragging the scroll bar.

[v4.1]

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### EDI – 843 UDF

The 843 UDF does not address the handling of multiple CDRLs attached to the same CLIN, therefore EDI will send only the first CDRL attached to the CLIN. The work solution for users who wish to send multiple CDRLs for one CLIN is to create sub-CLINs and attach one CDRL to each sub-CLIN.

[v4.1]

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### Summary of Changes Funding Data

When users modify or delete the last funding strip in a modification, the system does not properly reassign contract ACRNs. PD<sup>2</sup> currently reuses contract ACRNs, which causes discrepancies in the Summary of Changes. The work solution for this issue is to add the updated funding strip before deleting the old funding strip.

[v4.1b]